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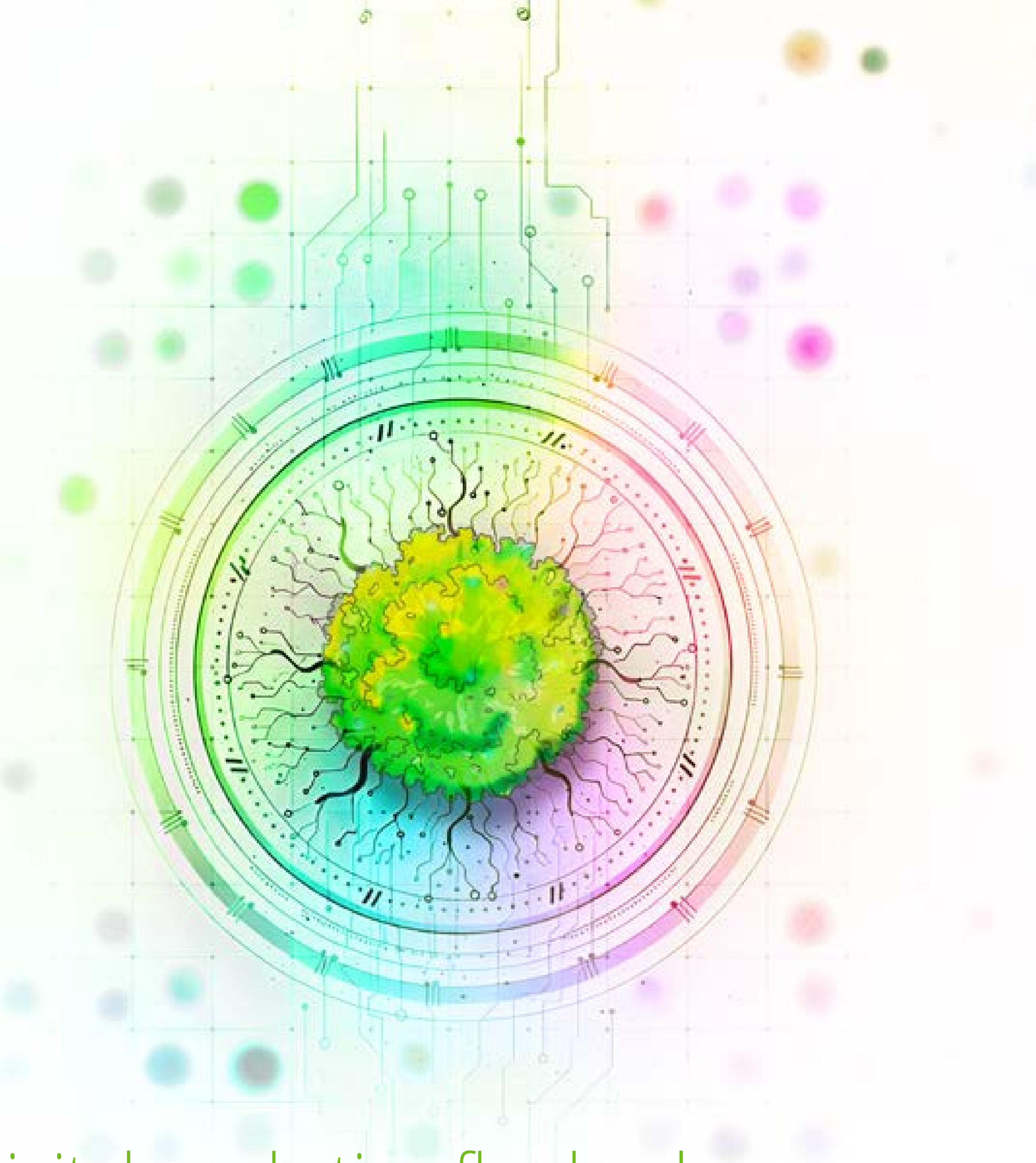
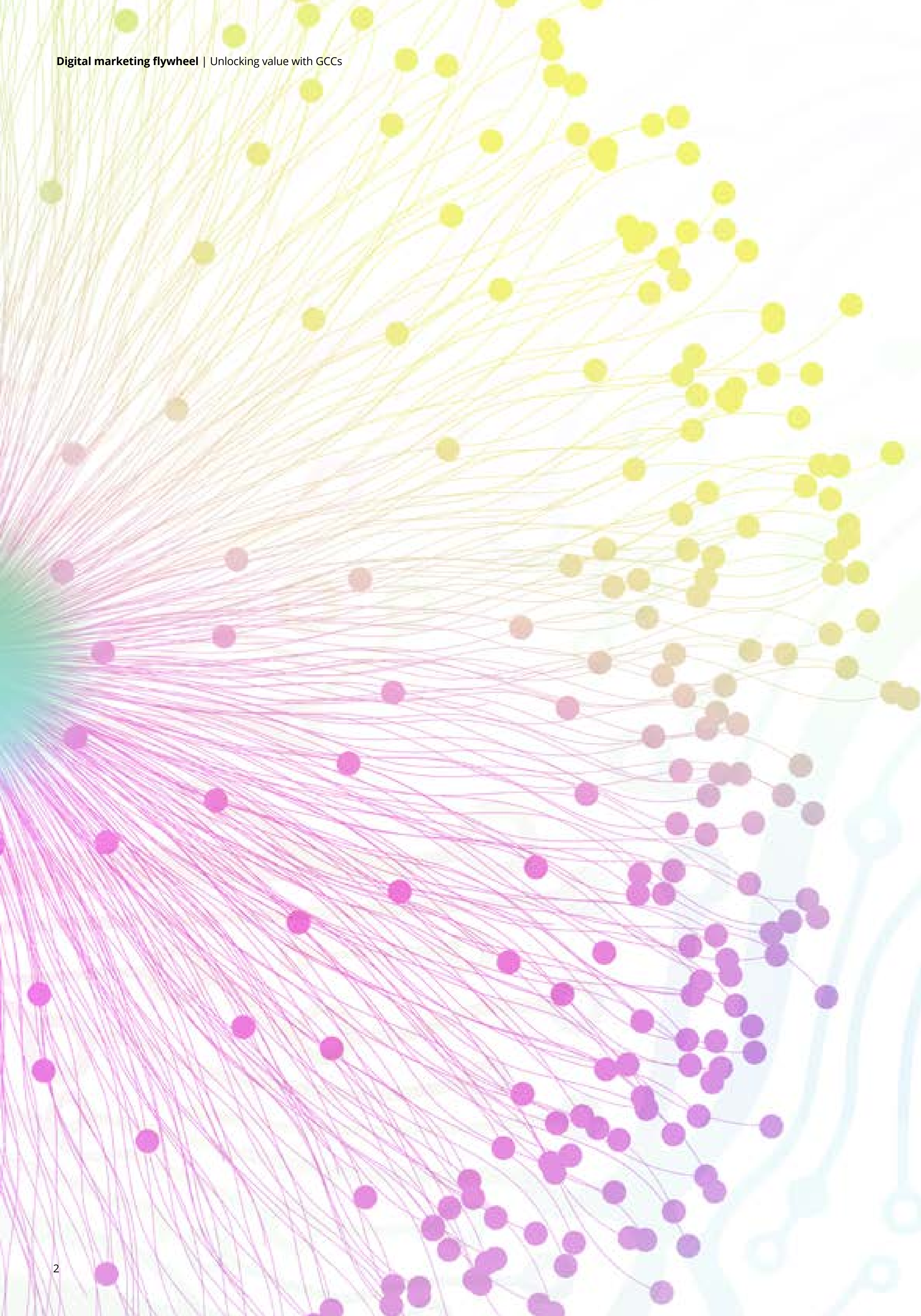


Digital marketing flywheel: Unlocking value with GCCs

July 2026



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Executive summary: Digital marketing flywheel

Why this matters now

Marketing is at an inflexion point; digital innovations and AI have transformed campaigns from creative-led initiatives into tech-enabled, data-driven engines of growth

While Global Capability Centres (GCCs) have delivered proven value in finance and IT, marketing remains largely untapped, even as CMOs face shrinking budgets and rising expectations

Digital marketing flywheel | Unlocking value with GCCs

Case for change

Budgets down, pressure up[1] – Marketing spend has declined from 12 percent of overall budgets (2019) to 9.6 percent (2026), forcing leaders to deliver more with less

Untapped scale[2] – Only 22 percent of Global Business Services (GBS) organisations include marketing, compared to 90 percent finance, highlighting a significant untapped opportunity

Proven impact[3] – Leading organisations report 50–75 percent cost savings, 30–50 percent faster turnaround and up to 5x campaign throughput through consolidated marketing in GCC

Strategic advantage

A marketing GCC is not just an execution hub–it is a growth accelerator. By centralising operations and using AI, analytics and Marketing Technology (MarTech), organisations can achieve the following:

- **Business value:** Scalable lead generation, rapid content creation, and personalized customer engagement
- **Optimise costs:** Significant savings through scale and standardisation
- **Drive speed:** Rapid campaign deployment across markets
- **Enable innovation:** AI-powered personalisation and insight-driven orchestration

Why act now?

Digital marketing has progressed beyond the proof-of-concept stage to scalable global delivery. The question is no longer whether to globalize, but whether organizations can build and scale capabilities before talent and expertise become increasingly constrained.

Deloitte can help

From strategy and design to scaled operations, Deloitte brings proven frameworks and global delivery expertise to build marketing GCCs that deliver measurable business outcomes fast

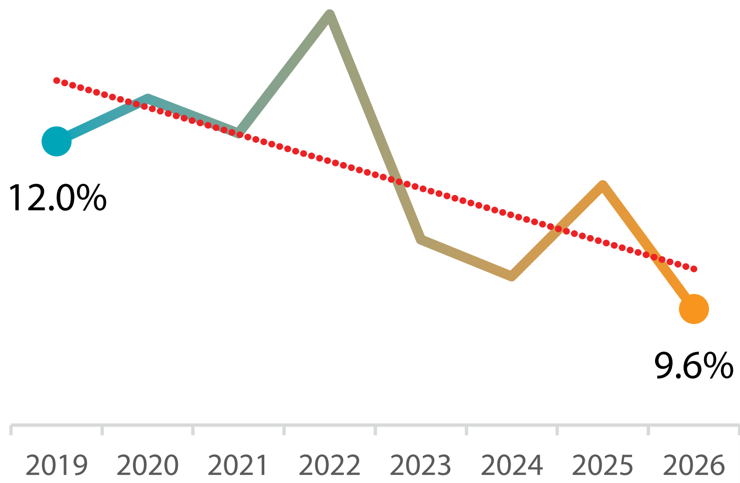
Source: [1] The CMO Survey – Topline Report, Topic 3 (Aug 2019) and Topic 6 (Jan 2026);
[2] Deloitte Global Business Services (GBS) Survey, 2025; [3] Deloitte experience

CMOs are facing growing pressure to do more with less

CMOs are pressured to deliver more with less[1,2]

Chief Marketing Officers (CMOs) face mounting pressure to deliver growth despite flattening budgets, making productivity non-negotiable

Marketing budget as % of overall budget



Marketing budgets have shrunk from 12 percent (2019) to 9.6 percent (2026) of overall firm budget

Tech and talent costs are under the scanner

Labour and tech together comprise nearly half the marketing budget.[3] CMOs seek smarter deployment, not more spend

Share of labour spend is declining

Headcount growth has halved compared to 2025 as CMOs:

- Eliminate overlapping roles
- Centralise critical capabilities (e.g. content ops, analytics)
- Rationalise team structures

Tech ROI discipline is increasing

Execution, integration and ROI lag is driving pressure to:

- Simplify MarTech stack
- Use existing platforms before buying new tools
- Eliminate redundant technologies

Source: [1] The CMO Survey – Topline Report, Topic 3 (Aug 2019), Topic 4 (Jun 2020), Topic 4 (Aug 2021), and Topic 6 (Jan 2026); [2] The CMO Survey – Highlights and Insights Report, Section 4 (2025), [3] Deloitte Digital Marketing Investment Trends (2025)

Technology is driving a shift to scalable, platform-led marketing delivery

Marketing is now digital: Shift towards scaled, platform-led growth

70%

increase in digital marketing spend (2021–2025), despite tightening overall marketing budgets[1]

94%

of companies say digital marketing is the primary responsibility of marketing[2]

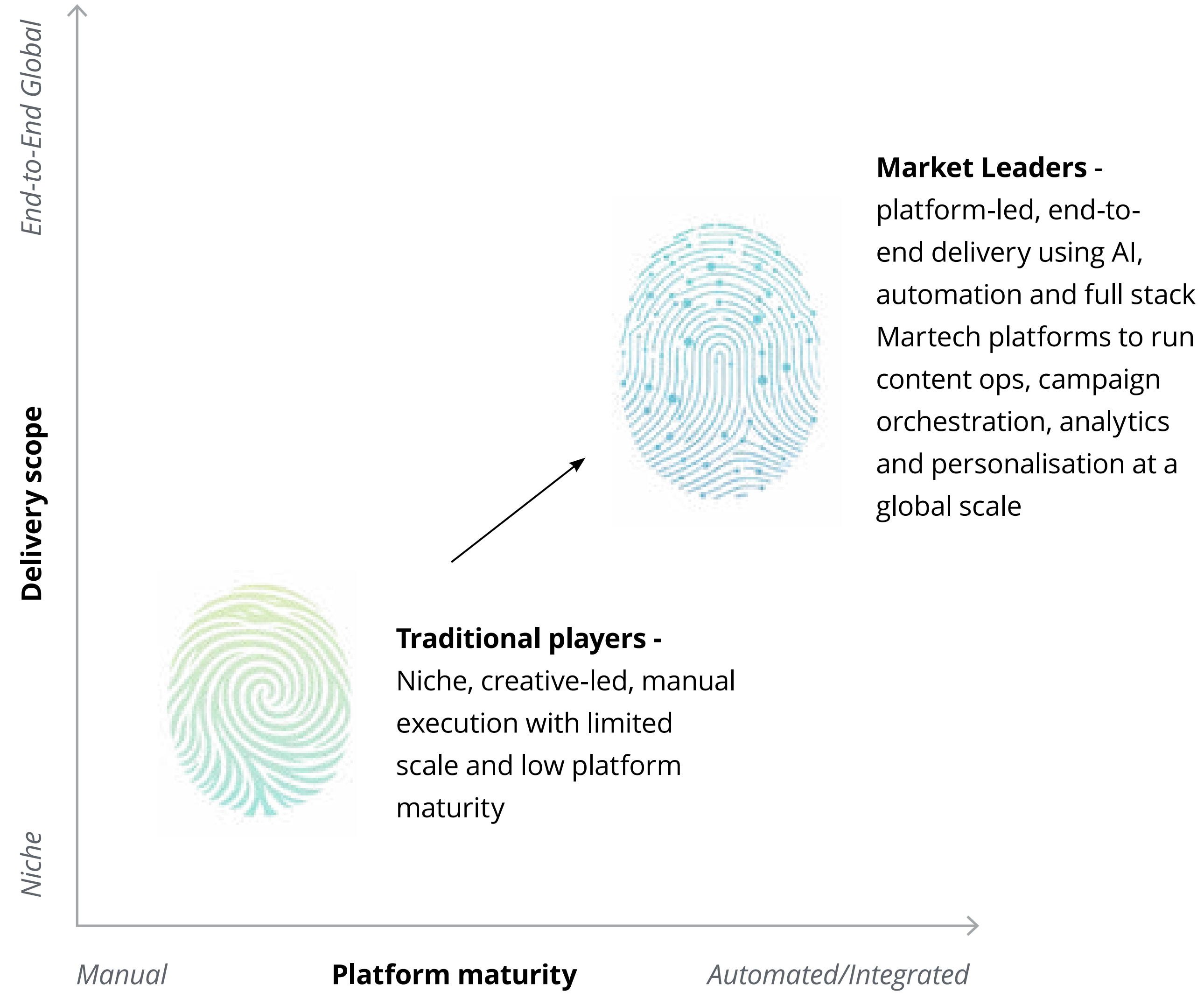
55%

of marketing efforts are expected to be optimised or automated using AI/ML by 2029[3]

Digital marketing has become a core growth driver and is increasingly tech-enabled, data-driven and AI-augmented

Source: [1] The CMO Survey highlights and Insights Report - Section 7, Jan '26 [2] The CMO Survey Topline Report - Topic 5, Jan '26; [3] The CMO Survey Topline Report - Topic 2, Jan '26;

Marketing service providers are reinforcing the trend: Pivoting to tech-based delivery



Marketing has evolved into a structured, tech-enabled function, making a strong case for scaled delivery from GCCs

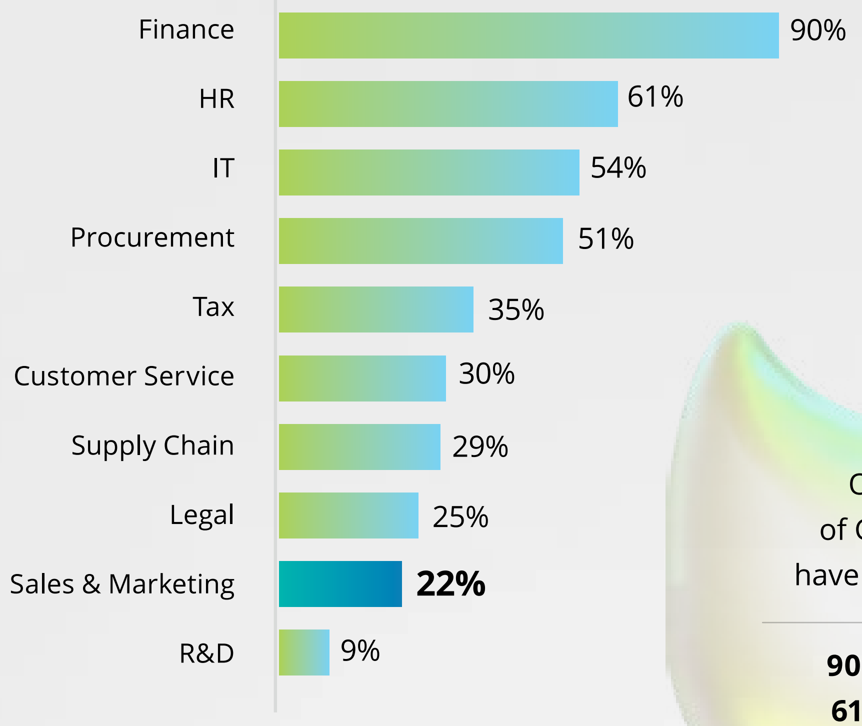
The shift to platform-led execution has made marketing delivery repeatable, measurable and less context-dependent

This model is well-suited for GCC adoption – mirroring how IT and finance delivery scaled in the past

GCCs continue to be underleveraged for Marketing as a function[1]

Marketing has traditionally been delivered through headquarters and regional teams, with limited GCC involvement

Share of Global Business Services (GBS) Organisations by function



Only **22 percent** of GBS organisations have marketing in-scope

vs.

90 percent finance, **61 percent** HR and **54 percent** IT

[1] Deloitte Global Business Services (GBS) Survey (2025)

CMOs can unlock productivity by embedding GCCs into marketing, thus creating a new model for scale, speed and savings

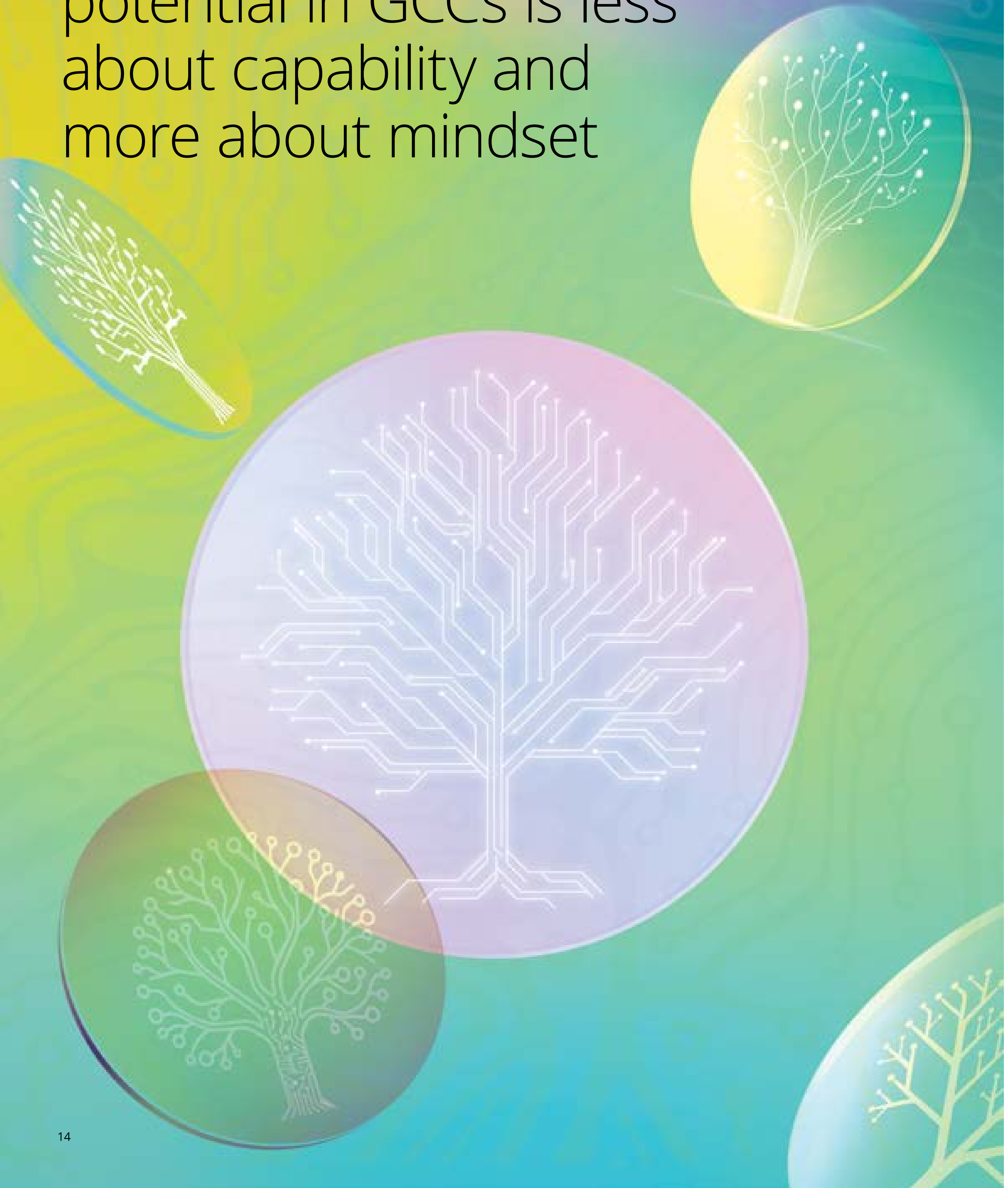
Leveraging GCCs for marketing can drive:

Faster execution

Better ROI on MarTech and GenAI

Cost optimisation

Untapped marketing potential in GCCs is less about capability and more about mindset



The perception of business context-dependence, legacy mindsets and talent constraints are slowing marketing's leap into global GCC delivery

Key concerns hinderinig marketing GCC adoption	Concerns rooted in historic perceptions	GCCs have already matured to mitigate these
"We cannot centralise marketing … it is inherently local."	Perceived loss of cultural nuance and creative control by HQ	GCCs pair standardised global playbooks with customised regional delivery
"Marketing is a creative field requiring deep business understanding"	GCCs are seen as removed from the business and lacking context	Marketing GCCs are delivering tech-enabled capabilities that do not require deep business understanding on Day 1
"Centralising customer data is risky … privacy and brand trust at stake."	Concerns on data privacy, regulations and reputational risk	GCCs have matured via other functions to operate with tested governance, compliance and multi-hub controls

"Local-only" perceptions fragment ownership of insights, experimentation and end-to-end innovation Viewing marketing GCCs solely as execution hubs limits their ability to leverage AI, analytics and platform-led approaches for scalable, repeatable marketing impact.

Organisations are already scaling marketing GCCs in India

Marketing services are increasingly being delivered through global shared services delivery models, including enabling scale, efficiency and performance across both repeatable and high-impact activities

Examples of companies with marketing functions in Indian GCCs[1]

Global retail / Consumer goods company
Supports campaign execution, creative production and loyalty programme performance management for global marketing activities

Global food and beverage multinational
Supports global marketing activities across creative production, digital commerce, retail media and analytics

Global biopharmaceutical company
Supports global omnichannel marketing activities, including campaign management, content production, SEO and analytics

Global financial services company
Supports AI-enabled digital content, lifecycle campaign management, marketing automation and performance analytics

Global asset management company
Supports marketing Center of Excellence (CoE) activities, including automation, campaign operations, MarTech platforms and analytics

Source: [1] Deloitte Research

Select case studies from Deloitte's past engagements[1]

Company	GCC's scope of work	Business outcomes enabled
Global science company	• Establish a scalable digital marketing capability (replacing siloed efforts) • Drive standardised campaign ops across HQ and regions	Potential for improved scale and efficiency in campaign execution (e.g. up to 5x increase in globally executed campaigns, up to ~20 percent reuse of campaign assets)
Leading US retailer	• Content production and asset management • Agile campaign support during spikes (e.g. holidays)	• 75 percent annual cost savings • 50 percent faster speed to market • 1M+ assets/year enabled
Global MedTech firm	• Creative content ops (visuals, video, sales/event collateral) • Digital Asset Management (DAM) workflow system • Scalable resourcing model	• Cost savings via optimised resourcing • Increased agility to handle fluctuating campaign volumes with improved regional collaboration
Global home appliance brand	• Centralised campaign operations in 42 countries using a flexible pod model	• ~50 percent annual cost savings • Improved global campaign agility • Streamlined cross-regional SEO/SEM

Source: [1] Deloitte experience

This shift is real and accelerating, leading firms are achieving enterprise-level value through consolidated global marketing delivery

Firms are going beyond basic execution, central hubs now drive analytics, content strategy, campaign agility and MarTech integration

GCC-based marketing models are enabling full-funnel impact, from time-to-market gains to revenue growth, quality and cost control

You may already be well-positioned

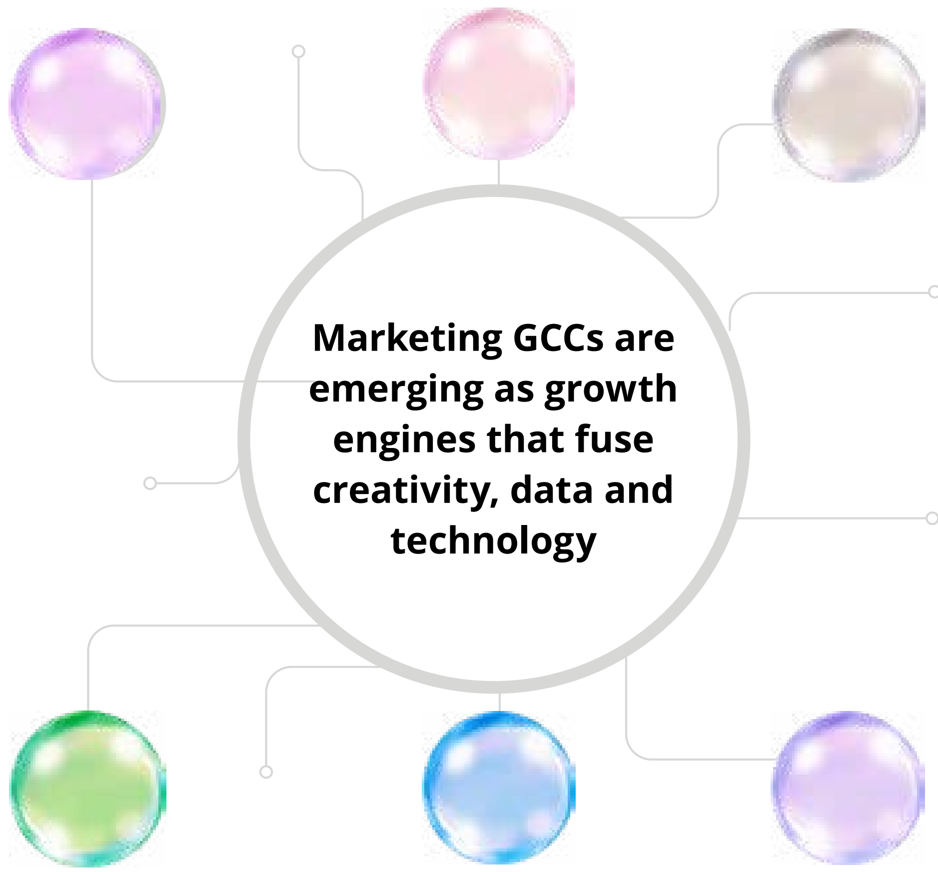
Marketing GCC expansion need not start from scratch; it can build on established GCC capabilities

Marketing operations align closely with scaled GCC functions, creating natural adjacency opportunities that reduce setup time and risk while enabling faster deployment of marketing capabilities.
Leveraging existing analytics, platforms, content functions, and shared tools allows organisations to establish measurement, MarTech enablement, and campaign execution more efficiently, reducing ramp-up effort and accelerating time to value.

Analytics/Business Intelligence (BI)
Leverages existing data and dashboards to power marketing measurement, attribution and performance insights.

R&D / Innovation
Integrates product and consumer innovation loops to co-create campaigns and accelerate go-to-market experimentation.

Customer Experience / Service
Converts voice-of-customer data into actionable insights for segmentation, targeting and retention.



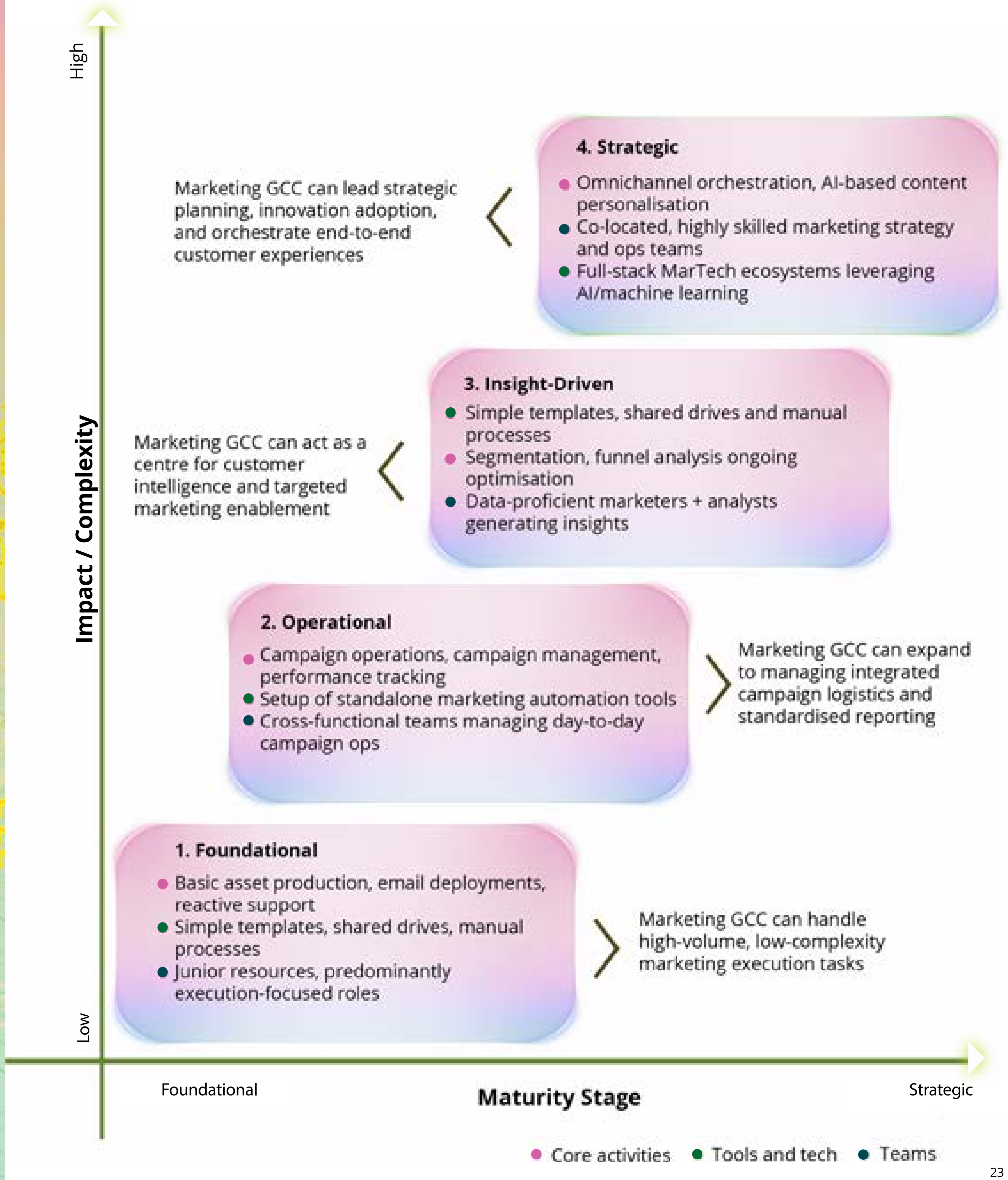
IT / Platform Engineering
Uses mature cloud and API platforms to accelerate MarTech integration, automation and omnichannel delivery.

CRM / Sales Ops
Extends customer workflows and campaign tools to enable lifecycle marketing and lead management at scale.

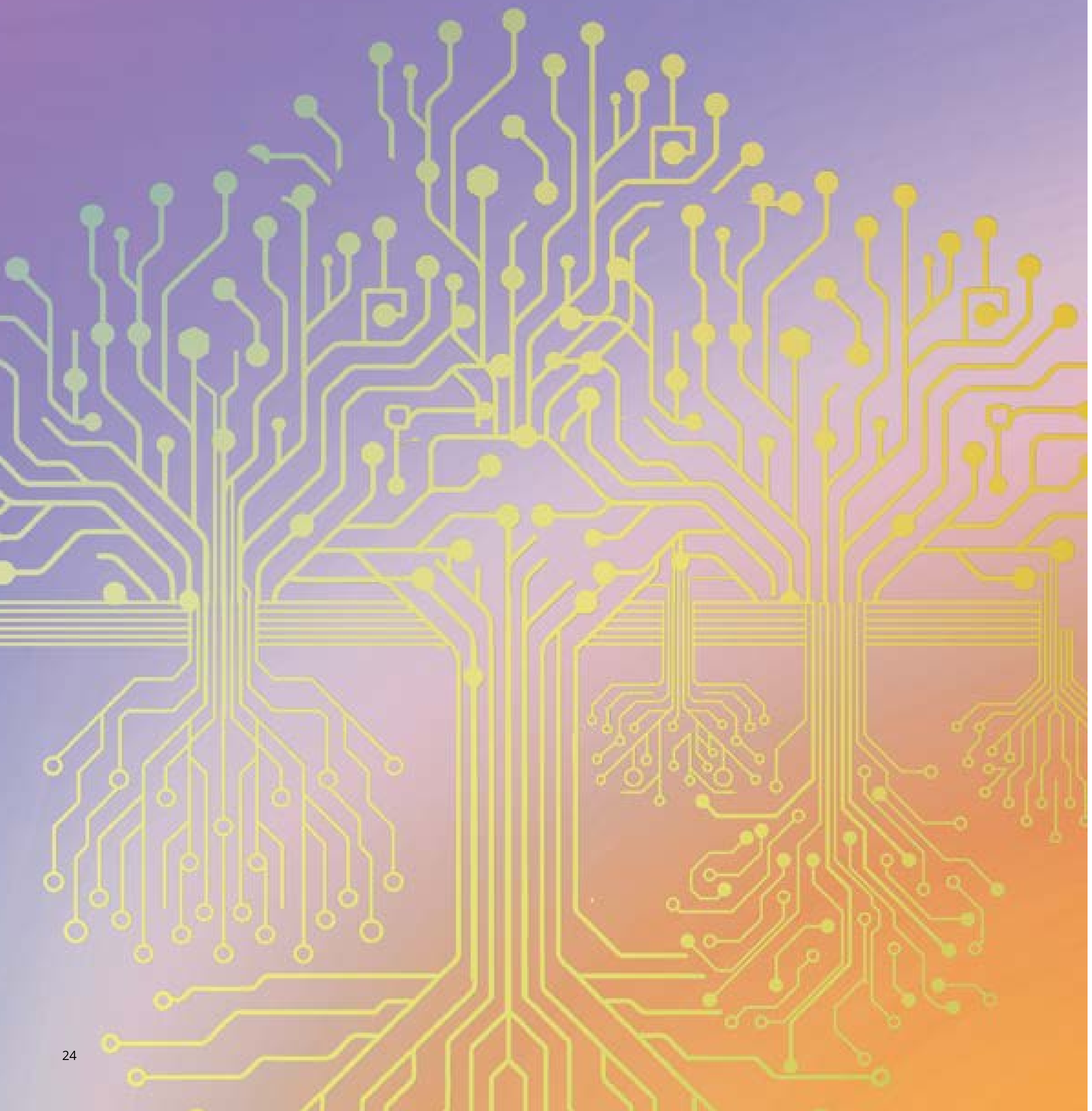
Content / Creative Ops
Repurposes centralised production and localisation hubs to deliver faster, brand-consistent global campaigns.

Identifying your digital marketing maturity level is critical to optimising resource allocation and scaling effectively

Digital marketing maturity evolution: From execution to strategic orchestration



The marketing function structure directly influences how a GCC should be designed to deliver maximum value



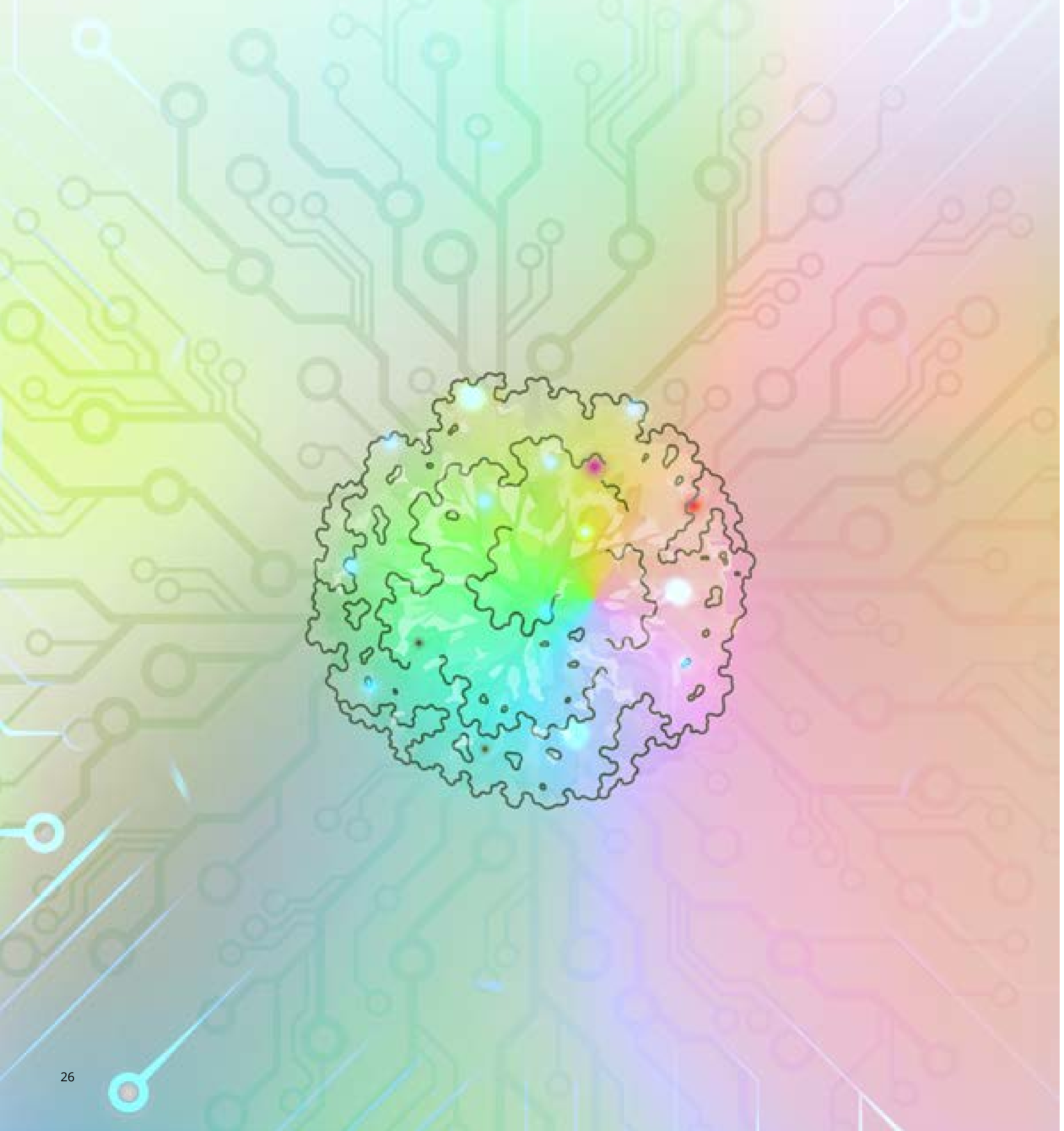
GCCs are inherently flexible and can be tailored to support execution, enablement or shared services depending on the level of regional autonomy and headquarters control

Marketing function archetype

	Centralised	Centre of Excellence	Decentralised
Marketing function archetype	Global HQ owns strategy, planning, budgeting and execution; Regions play a minimal role	Global HQ defines strategy, frameworks and tools; Regions have flexibility in execution	Regions have full autonomy over strategy and execution; Global HQ provides minimal oversight
GCC value add	• Execute global campaigns at scale • Centralised analytics and reporting • Manage MarTech stack and tools	• Develop playbooks, templates and best practices • Run enablement programs • Support campaign localisation/ops	• Provide shared services e.g. design, content ops, digital execution • Enable knowledge sharing • Benchmark performance
Typical industries	Luxury goods, global tech brands, and financial services	Healthcare, pharmaceuticals, energy and utilities, automobile	FMCG, Hospitality, Telecom

Legend: Full ownership (Strategy + Execution) — Minimal ownership; Region; HQ

A structured approach to unlock the full potential of marketing GCCs



Digital marketing flywheel | Unlocking value with GCCs

Marketing GCC adoption typically progresses from alignment to scaled, integrated delivery–shaped by organisational structure, maturity and strategic priorities

Imagine

Align on the target operating model across HQ, regions and GCC

Assess current capabilities across people, process, data and platforms

Prioritise high-impact use cases to anchor early value

Establish clear roles and decision rights

Build

- Configure and integrate marketing platforms
- Establish data, governance and performance frameworks
- Standardise campaign execution and reporting
- Enable GCC teams across ops, analytics and content

Scale

- Shift to insight-led campaign enablement and optimisation
- Drive continuous improvement and asset reuse
- Scale globally coordinated, platform-led delivery
- Improve efficiency and consistency across markets

Govern and drive value

- Set up and govern the transformation programme with clear KPIs and tracking
- Drive cross-functional alignment across marketing, IT and regional teams
- Ensure sustained value creation through stakeholder engagement and measurement

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